

PROPELLING QUÉBEC'S MINING SECTOR

Québec Strategy for the Development of Critical and Strategic Minerals

SUMMARY DOCUMENT



A strategic opportunity to seize

- » The energy and digital transition as well as security and defence needs are propelling the global demand for critical and strategic minerals (CSMs). With its abundant resources, Québec has everything necessary to meet this demand and form **strategic partnerships** for the development of these sectors.
- » Faced with the control exerted by some players over the mining, transformation, and trade of CSMs, **the implementation of projects in Québec is becoming an imperative in terms of security and economic sovereignty.**
- » Québec's Economic Vision, unveiled in the fall of 2025, has a clear ambition to **make Québec a true hub for CSMs on the international scene.**



DID YOU KNOW?

« With **23 metallic and non-metallic substances** extracted, Québec is the largest producer of **lithium** and **high-purity iron** in Canada as well as the only producer of **graphite**. It is also North America's only producer of **niobium**, **scandium**, and soon, **gallium**. »



+ 50%
of mining projects*
(2019-2024)

* have reached the deposit appraisal stage



+ 274%
increase in expenditures
on exploration and development
of critical and strategic minerals
(2019-2024)



+ 20
active mines, 8 of which produce
CSMs



+ 50
mining projects have reached the
deposit appraisal stage, more than
half of which are targeting CSMs



+ 1,100
publicly known mineral
exploration projects, including
over 600 related to CSMs



\$6.2 billion
in private mining investments
(2024)



\$12.8 billion
in shipment value
(sales of mining products)
(2023)

Taking the next step – creating more value in Québec

- » It is within this perspective that the **2025-2031 Québec Strategy for the Development of Critical and Strategic Minerals** is framed.
- » It sets out an overall vision and concrete actions that will build on the strengths of Québec's mining and mineral ecosystem and expertise, as well as on a dialogue with Indigenous and local communities.
- » Already, from 2020 to 2025, the number of CSM projects that have produced a preliminary economic assessment to enter the deposit development phase has doubled to 36 projects, representing two thirds of all mining projects that have reached this stage.
- » To maintain this momentum and maximize the economic benefits, the government is focusing on the **development and processing of CSMs in Québec** by putting in place conditions that are conducive to attracting the substantial private capital required.
- » The Strategy's implementation is supported by a total budget of \$88.1 million, for the 2025-2031 period, in addition to many other government financial levers that can contribute to its objectives (NREC Fund, QIP, tax measures, etc.) and exceeding \$3 billion.

THE STRATEGY'S FOUR ORIENTATIONS

1

Improve the business environment and accelerate projects

- » To accelerate the development of mines and strategic sectors, Québec must rely on a competitive business environment and simplified authorisation processes, without lowering its standards.
- » By 2031, the goal is to reduce permitting processing times and simplify procedures by focusing on the following initiatives: an **accelerated environmental impact assessment and review procedure**, the possibility of using a **single authorisation process** (Bill 5) and the collaboration of the federal government to **eliminate duplication of environmental assessments**.
- » Other actions already in progress, notably aimed at offering personalised support to promoters, will also contribute to this: implementation of **the modernised Mining Act, large-scale administrative streamlining, one-stop service and optimisation of processes** for quicker issuing of rights and authorisations.
- » These measures will enable Québec to set itself apart, accelerate the production of mining projects and strengthen its competitiveness on the international stage.



Develop the entire CSM value chain

- » Becoming a key player requires the development of integrated supply chains, supported by major investments and high standards.
- » The objective for 2031 is clear: to **structure vertically integrated chains, from mining to processing and recycling**, in order to consolidate Québec's place in the international value chains.
- » The government will strengthen **Québec's brand image** on the world stage and assert its leadership in the CSM sector. The conclusion of agreements with investors and the signing of long-term supply contracts will be essential levers to support mining projects.
- » **Research, innovation and integration of the circular economy** will be priorities to address mining-related technical and commercial challenges. Targeted actions also include mine tailings reprocessing, traceability and the adoption of responsible practices.
- » The research and innovation ecosystem will be supported. This support will help to create and strengthen industrial sectors that are capable of making the most of Québec's CSM.
- » **The Ministère de l'Économie, de l'Innovation et de l'Énergie and Investissement Québec will make transformation a priority in their efforts** to attract the private and institutional capital required for the emergence of projects and to maximize the economic and strategic benefits for Québec.
- » The potential is real: taking into account the mining and industrial projects currently under development and at the most advanced stage, it is estimated that **new investments of nearly \$8 billion could be made in the medium term.**



Plan and develop strategic logistics infrastructure

- » To support the development of mining and industrial projects, Québec must meet a major challenge: access to transport, energy and telecommunications infrastructure, especially in northern and remote regions. Infrastructure is essential for reducing costs, accelerating projects and integrating innovative technologies.
- » By 2031, the goal is to put in place efficient infrastructures and an integrated plan for connecting deposits to markets and promoting local transformation, thereby consolidating Québec's role as a key player in global supply chains.
- » The government is notably focusing on **the modernisation of industrial port zones, including those of Bécancour, Saguenay and the Côte-Nord region.** Other projects are also under study, such as **Horizon 7** from the SFP Pointe-Noire. Efforts will also focus on improving road and rail corridors. For example, a feasibility study is underway for a **railway loop for the Labrador Trough.**
- » For long-term coordinated development, the Strategy calls for the creation of a vision and an **integrated infrastructure development plan for the Labrador Trough** and for the **Eeyou Istchee James Bay territory**, where the main CSM development potential can be found.
- » Finally, solutions to **improve access to energy** to meet the needs of mining projects will be evaluated according to the requirements associated with each project and as they progress.



4

Engage partners

- » Mining development is a major economic driver, and to derive maximum benefit from it, Québec is counting on the mobilisation of Indigenous and local communities, companies and international partners to create sustainable economic spin-offs and promote the **social acceptability of projects**.
- » By 2031, the goal is to build **strong partnerships**, inform and equip communities, and **consolidate Québec's reputation** as a major player on the world stage.
- » The government is committed to **supporting communities and partners** in infrastructure planning, workforce training and economic diversification, while promoting the reduction of environmental liabilities. It is also banking on **mineral diplomacy** to attract capital and **international collaboration** to secure supply chains.

**Data source:**

City of Chibougamau, Mathieu Dupuis, Ministère des Ressources naturelles et des Forêts, Raglan Mine (a Glencore company), SFP Pointe-Noire

**Ressources naturelles
et Forêts**

Québec

